Indicators

June 2002

The main fruits

In shares by total volume and expenditure on fruits for the month in France		
%	Volumes	Expenditure
Apple	19	11
Peach/Nect.	19	20
Banana	15	9
Cherry	9	14

The trends for the main produce of the month significantly influence the overall situation of the fruit market. A column entitled 'Indicators' discussing these fruits precedes the pages devoted to a selection of exotic and citrus fruits.

Pages

Apple

June 2002 / June 2001			
Price	↗	Vol.	↘

Releases had slowed markedly in May and remained modest in June. Indeed, competition from southern hemisphere fruits began to be significant. Prices remained distinctly higher than last year's.

Peach/Nect.

June 2002 / June 2001			
Price	↘	Vol.	↗

The coinciding of plentiful Spanish and French seasons resulted in substantial volumes throughout June. The market was thus subjected to strong pressure, causing increased competition with the other products. Prices weakened to a lower level than those of last year.

Banana

June 2002 / June 2001			
Price	↘	Vol.	↘

After being favourable since the beginning of the year, the market suddenly worsened considerably in June. Shipments were greater than the average for previous years while demand slowed markedly because of strong competition from summer fruits. The average price therefore approached the very disappointing level reached in 2000.

Cherry

June 2002 / June 2001			
Price	↗	Vol.	↘

The beginning of the season was marked by bad weather that resulted in a very strong decrease in volumes in comparison with last year. In contrast, prices were higher but without compensating the fall in volume.

Notes concerning market appraisal methodology

The statistics on the following pages are estimates of quantities put on the market in France. They are only calculated for the main supplier countries and are drawn up using information on weekly arrivals or market release statements by representative operators. The past figures are kindly provided from the POMONA data base and processed by CIRAD. The figures in the 'Main fruits' section above are provided by the CTIFL, with SECODIP being the source. The data published in the French market pages is provided solely as a guide and CIRAD accepts no responsibility for their accuracy. The illustrations are reproduced with the kind permission of Fabrice Le Bellec (CIRAD-FLHOR).

Banana

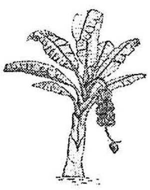
JUNE 2002

Monthly comparison: June 2002 / May 2002

Price	Volumes
↘ -10%	= ↘ -2%

Annual comparison: June 2002 / June 2001

Price	Volumes
↘ -7%	= ↘ -2%

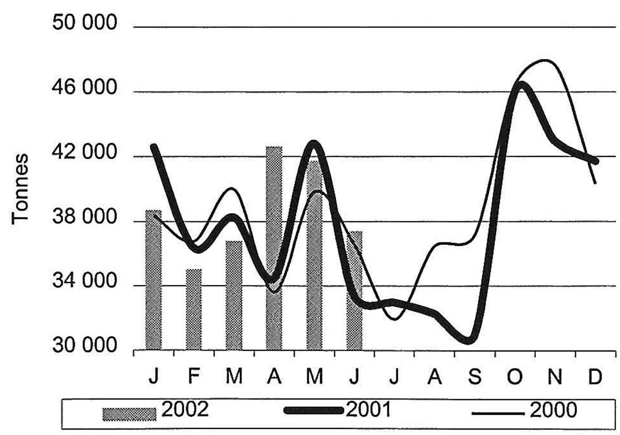


After being comparatively favourable since the beginning of the year, the market suddenly worsened considerably in June. Shipments were greater than the average for previous years while demand slowed markedly because of strong competition from summer fruits. The average price therefore approached the very disappointing level reached in 2000.

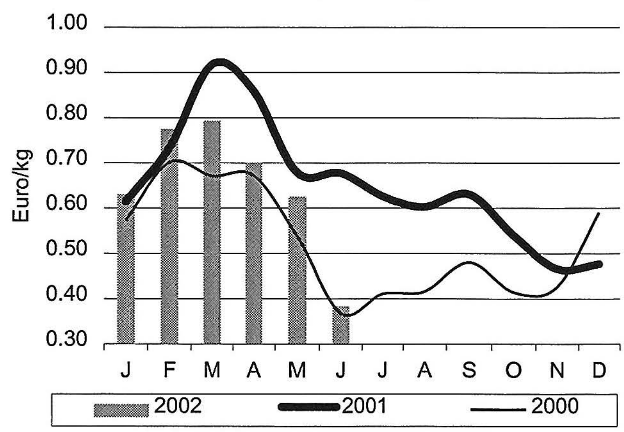
The large volumes of supplies is the main factor accounting for this major crisis. An increase of about 12% in comparison with 2001 and 6% in comparison with the average shipments from the West Indies and Africa for the past three years was observed. Furthermore, hitherto dynamic local demand collapsed. On the one hand competition from summer fruits, with large crops this year, was particularly strong from the beginning of the month onwards. On the other, supermarkets promoted banana (numerous special offers) but at prices similar to last year's and very different to ex quay prices (special offers in June were set at an average of Euro 1.34 per kg in comparison with Euro 0.39 per kg at the green stage, that is to say a ratio of 1 to 3.4). The export flow also slowed and became insignificant at the end of the month. Prices thus dipped, approaching those of the crisis in 2000.

Banana — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — June 2002

Tonnes	June 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002	2002/2001	2002/2000
Côte d'Ivoire	8 165	+ 10	0	51 731	+ 2	- 1
Cameroon	9 177	+ 20	+ 23	53 803	- 4	- 1
Martinique	13 643	+ 11	- 13	87 537	+ 5	- 1
Guadeloupe	6 409	+ 7	+ 25	39 277	+ 3	+ 31
Total	**37 394**	**+ 12**	**+ 2**	**232 348**	**+ 2**	**+ 3**

Avocado

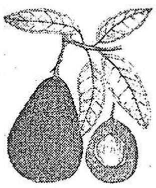
JUNE 2002

Monthly comparison: June 2002 / May 2002

Price	Volumes
↘ -10%	= ↘ -2%

Comparatif annuel June 2002 / June 2001

Price	Volumes
↘ -7%	= ↘ -2%



Demand recovered in June and supplies were also smaller than average, especially of green varieties. However, performance was comparatively disappointing as prices decreased by nearly 25% in comparison with the average for the past three years.

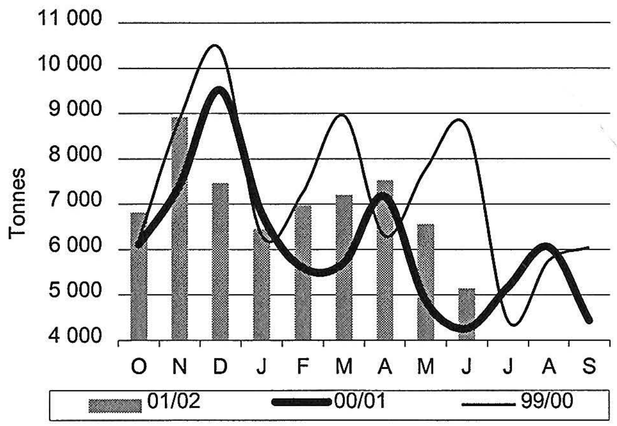
Interest in avocado revived somewhat, especially during the second half of the month, probably because of the shortage of supplies of melon.

Furthermore, arrivals were distinctly smaller than the average for the past three years, especially for green varieties. Supplies from Kenya were modest in June as importers cut their schedules considerably after the difficulties in May. In addition, supplies of Fuerte from South Africa decreased at an early date. In contrast, supplies of Hass were more plentiful, approaching the average for the season as a result of the prolonging of the winter origin seasons (until early June for Israel and the end of June for Spain) and an early increase in supplies from South Africa.

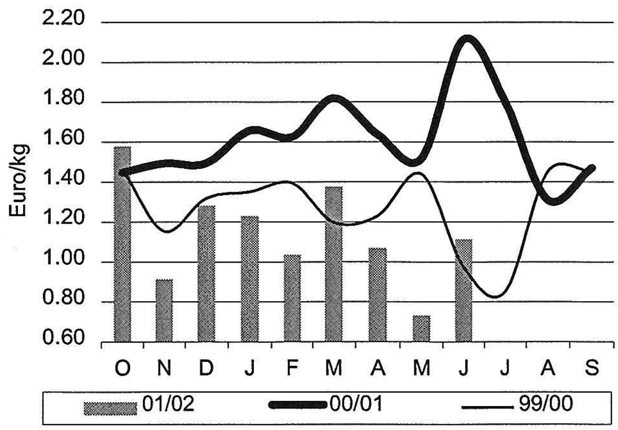
Prices nevertheless did not really manage to shift from the disappointing levels of the end of May.

Avocado — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — June 2002

Tonnes	June 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002/2001	2002/2001	2002/2000
Israel	232	+ 2 867	+ 86	23 155	+ 33	0
Spain	1 483	+ 424	- 25	25 536	+ 12	+ 1
Mexico	-	-	-	8 013	+ 9	- 34
Kenya	759	- 40	- 58	3 224	- 44	- 49
South Africa	2 751	+ 2	- 42	6 495	+ 97	+ 1 539
Total	**5 225**	**+ 23**	**- 40**	**66 423**	**+ 25**	**- 1**

Orange

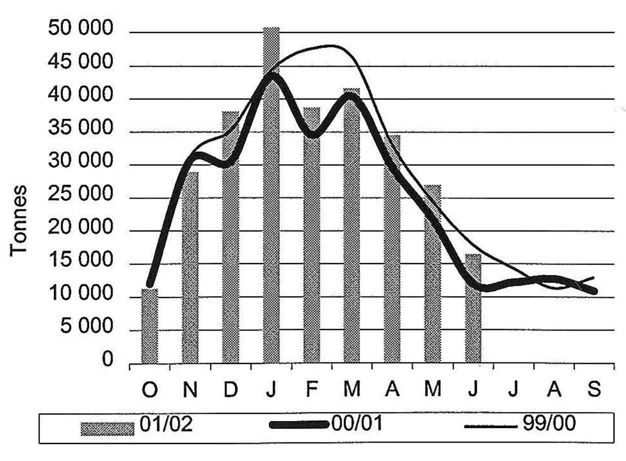
JUNE 2002

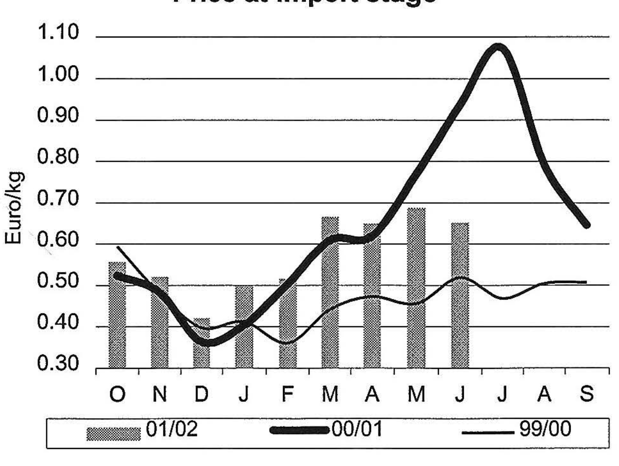
Monthly comparison: June 2002 / May 2002	
Price	Volumes
↘ -4%	↘ -40%
Comparatif annuel June 2002 / June 2001	
Price	Volumes
↘ -30%	↗ +37%

Demand was still good for the time of year during the first part of the month but slowed distinctly after mid-June as the result of strong competition from summer fruits. Distribution handled mainly winter origins, especially Spain which had a strong potential of late varieties this season. Navels from South Africa were therefore unable to gain a position on the market.

Hitherto strong interest in orange decreased distinctly this month in favour of summer produce but remained greater than the average for the past three years, with focus mainly on winter origins. Substantial arrivals of Maroc Late and Valencia from Spain were still to be found on supermarket shelves at a late date and Navel from South Africa was unable to get a market foothold. However, as supplies were distinctly more modest than in recent years in the EU, especially in France, prices resisted until the middle of the month, when the balance was suddenly upset under the pressure of available stocks in northern Europe. Releases of Maroc Late slowed considerably in this context and significant stocks remained to be sold at the end of the month. Prices were nevertheless higher than those of 2000 but varied considerably from one origin to another.

Orange — Estimated market releases in France





Estimated market releases in France by origin — June 2002

Tonnes	June 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002/2001	2002/2001	2002/2000
Spain	10 353	+ 68	- 10	239 539	+ 22	+ 1
Tunisia	0	0	0	21 909	+ 3	- 13
Morocco	1 544	+ 683	+ 438	18 318	- 34	+ 23
South Africa	4 394	- 21	- 28	9 447	- 12	- 20
Total	**16 291**	**+ 25**	**- 9**	**289 213**	**+ 13**	**- 1**

Grapefruit

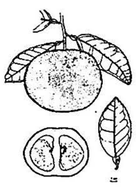
JUNE 2002

Monthly comparison: June 2002 / May 2002

Price	Volumes
↘ -10%	= ↘ -2%

Comparatif annuel June 2002 / June 2001

Price	Volumes
↘ -7%	= ↘ -2%



The grapefruit market displayed the first poor performance since October, with the average price falling to its lowest level for four seasons. Demand slowed more markedly than in the preceding seasons. The main feature was the large quantities available as a result of the prolonging of the winter seasons and an explosive start to the South African season.

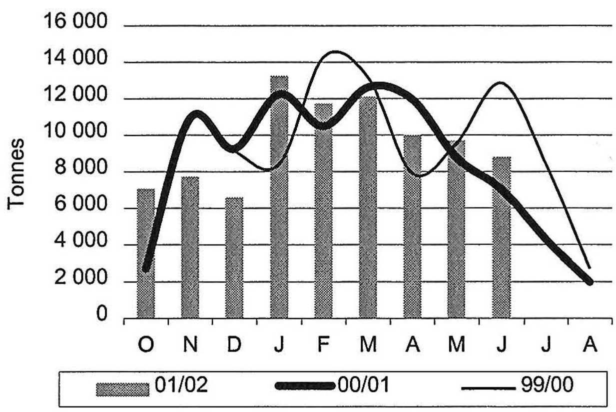
Very lively competition from summer fruits strongly slowed demand for grapefruit that had been healthy since the start of the winter season.

Shipments were particularly ample, breaking the balance of this delicate market in week 23.

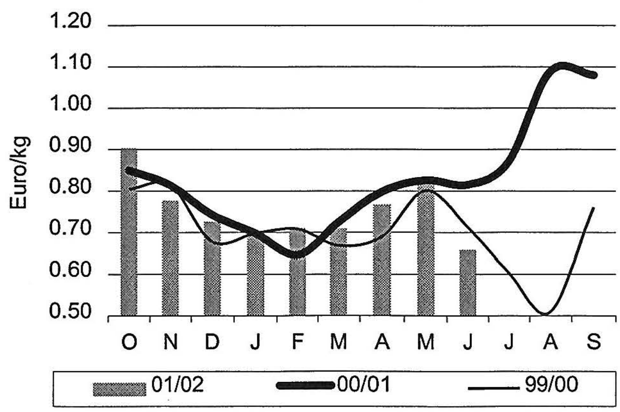
The winter origin seasons were prolonged and so the distribution sector continued to handle fruits from Israel and Florida until the end of the month, although the quality varied considerably from one brand to another. In addition, arrivals from South Africa increased explosively. Stocks thus formed rapidly, consisting in particular of 50/55 grade fruits, causing a downward price trend.

Grapefruit — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — June 2002

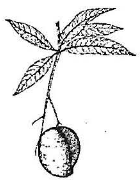
Tonnes	June 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002/2001	2002/2001	2002/2000
Florida	238	+ 1 650	- 69	57 617	0	0
Israel	551	+ 1 218	- 68	7 515	- 24	- 45
Turkey	-	-	-	10 815	+ 29	+ 73
South Africa	5 102	+ 10	- 25	7 169	+ 15	- 7
Argentina	2 916	+ 26	- 19	3 896	- 2	- 5
Total	**8 807**	**+ 26**	**- 31**	**87 012**	**+ 1**	**- 2**

Mango

West African Season

Import price — JUNE 2002

Euros/kg	Min	Max
Mali		
Kent - air	2.30	2.40
Burkina Faso		
Kent - air	2.30	2.50
Côte d'Ivoire		
Kent - sea	1.25	1.60



The West African season continued to dominate the market with coloured varieties in June. The situation remained fairly stable with limited supplies and more restrained demand for tropical fruits.

The **Côte d'Ivoire** season continued throughout the month with shipments by sea down by about 30% in comparison with the same period last year. This decrease—even if it was fortuitous—made it possible to balance the market and keep prices steady. The tonnages imported decreased markedly during the second half of the month, a presage of the end of the season. Arrivals from Côte d'Ivoire consisted mainly of Kent fruits. The proportion of Keitt increased but did not exceed 50% of deliveries. Shipments were often completed by Palmer. The quality of fruits from Côte d'Ivoire decreased slightly in June. An increase in peel defects (scratches, stains, etc.) and anthracnose attacks was added to the disparity at the ripe stage that had already been observed.

Exports from **Mali**, the second-largest African mango supplier, also decreased strongly in June, with a total of about 70 tonnes. The quality of the fruits of this origin varied from batch to batch. Both Kent and Keitt displayed numerous peel defects and wrinkling during ripening. Here again, the small quantity of produce meant that sales prices remained fairly stable.

Supplies from **Burkina Faso** completed supplies from West Africa with small batches of good quality mangoes that sold at better prices than those from Mali.

Supplies in the first half of the month included a few batches of Keitt from **Puerto Rico** and **Venezuela**. These ripened rapidly and sold with difficulty in the face of competition from West African fruits that were generally of better quality.

The decrease in arrivals from West Africa during the second half of the month sent the market into another transition period. Without a dominant origin, the market became unstable and operators sought fruits from other sources to satisfy the requirements of their customers. Fruits shipped by air from **Pakistan** gradually appeared—Sindhri and Chausa (yellow varieties)—selling at about Euro 2.75 per kg, together with Kent from **Mexico**, Haden from the **Dominican Republic** and Tommy Atkins shipped from **Brazil** by sea.

The **Senegal** export season started in the last week of the month with Keitt and Haden flown from Casamance. These fruits displaying lack of colour, defective grading and peel defects sold at from Euro 2.00 to 2.40 per kg. The first Kent mangoes shipped by sea from the same origin arrived at the end of week 26. They were of good quality, lacking somewhat in colour, and sold at Euro 1.83 per kg.

Mango — Prices in euros per kg — At import stage

Weeks 2002	23	24	25	26
By air				
Senegal				
Keitt/Haden				2.00-2.40
Mali				
Kent	2.30-2.40	2.30	2.30	
Burkina Faso				
Kent	2.30-2.45	2.4	2.40-2.50	2.40-2.50
By sea				
Côte d'Ivoire				
Kent	1.25-1.60	1.25-1.50	1.25-1.50	1.25-1.60
Senegal				
Kent				1.83

Estimated market releases in France from Côte d'Ivoire (mango by sea)